

INSTRUCTIONS FOR COMPLETING CIVIL-PROBATE COVER SHEET

The probate reporting form and the information contained herein is intended for case assignment and statistical purposes. It shall not be admissible as evidence in any court proceeding or replace or supplement the filing and service of pleadings, orders, or other papers as required by law or Supreme Court Rule. Authority: Supreme Court Administrative Order Number 8.

FILING INFORMATION

The Filing Information must be completed by the attorney or pro se litigant filing an initial pleading with the court Clerk. The Clerk shall not accept the pleading unless accompanied by this reporting form. The Clerk shall place the original reporting form in the case file and send a copy of the filing information to the Administrative Office of the Courts in a weekly mailing.

Line 1: Fill in the blanks for County and Judicial District where this pleading is being filed. Unless this is a re-opened case, the Clerk will assign you the docket number to fill in that blank.

Line 2: Fill in the blanks for Judge's name and Division (if applicable). In a multi-judge county, the Clerk will tell you the correct Name and Division or will complete this information. The Filing Date is the month, day, and year you are filing this pleading.

Line 3: Fill in the Name of the Case as it appears in the style of the pleading you are filing.

Line 4: Fill in your name and address. "Pro Se" means you are filing this pleading on your own behalf and are not represented by an attorney.

Line 6: Reference any related case(s).

Type of Case: Place an "X" in the single box which best describes the subject matter of the pleading you are filing. If no Type accurately describes the subject matter, place an "X" in the box for Other.

Manner of Filing: Place an "X" in the appropriate box. For the purposes of this reporting form, the following definitions apply. "Original" means a filing of a complaint or petition at the beginning of a case. "Re-open" means a case which has been disposed of but is now being resubmitted to the court. For example, a guardianship has been granted and terminated, and the subject of this pleading is a petition requesting the appointment of a new guardian. "Transfer" means a case filed with this court from another court due to invalid jurisdiction, venue, etc.

DISPOSITION INFORMATION

When the final order/decreed/judgment is filed with the Clerk, the Clerk or other official as the trial court may designate, shall complete the following disposition information on the reporting form which was placed in the case file when the initial pleading was filed.

Disposition Date: This is the month, day, and year of the Clerk's date stamp.

Place an "X" in the appropriate box for type of trial. For the purposes of this reporting form, the following definitions apply. A "Bench Trial" is a trial in which there is no jury and in which a judge determines both the issues of fact and law in a case. A "Non-Trial" is where a probate case is disposed of by one of the following methods:

- a) a settlement by agreement of the parties;
- b) an order of dismissal;
- c) an order granted prior to trial which concludes the case;
- d) the respondent did not respond to the allegations contained in the petition, e.g. an uncontested matter.

Disposition Type: Place an "X" in the box which best describes how the trial court disposed of the matter.

The Clerk or a Deputy Clerk shall sign on the signature line. A Clerk's signature stamp will suffice. The date is the same as the Disposition Date. The Clerk shall retain the original reporting form in the case file and send a copy of the disposition information to the Administrative Office of the Courts in a weekly mailing.